



# SECURE SENIORS

SECURING SENIORS FROM FRAUD



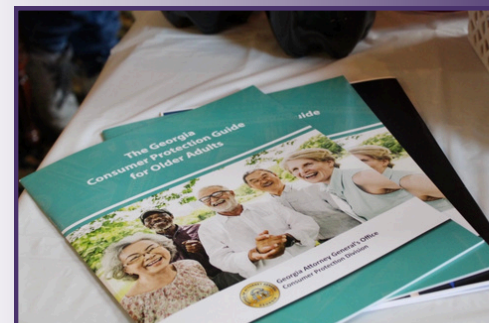
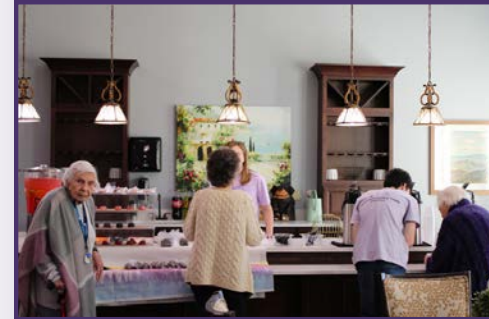
Financial Literacy Project  
04/27/2025

Elijah Ochoa, Mikala Souther, Turner West

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# I. EXECUTIVE SUMMARY



## PROBLEM

In America, 1 in 6 elders risk falling victim to a scam, resulting in a median loss of \$33,915 per crime. This devastating loss nearly measures up to our nation's median income of \$37,585. Alarming, only 1 in 44 of these cases gets reported, leaving countless victims without justice. Seniors are at a substantial disadvantage due to continuously advancing technology and are commonly targeted through data breaches, fake investments, phishing, robocalls, and tech fraud support.

Lack of knowledge  
about scammers

Lack of involvement  
to help elderly

## SOLUTION

To address these problems, we developed a project called Secure Seniors. Our organization is dedicated to informing seniors 60 and older about the most prominent scams that victimize their generation while teaching listeners how to safeguard themselves against fraud. Through serving, advocating, focusing, and educating (SAFE), Secure Seniors strives to leave a lasting impact on our North Georgia region and reduce the prevalence of fraud across the United States.

## PROJECT GOALS: SAFE



**Serve** the elderly community throughout the United States by providing resources in conjunction with engaging regional events.



**Advocate** for seniors by hosting interactive functions at five regional senior facilities and virtually at 150 national establishments.



**Focus** on reaching over 10,000 impressions on social media platforms to garner the attention of caregivers and family members.



**Educate** over 7,500 seniors with quality financial literacy events on money, scams, and fraud by catering to seniors' personal situations.

## MISSION STATEMENT

Secure Seniors strives to educate individuals 60 years of age and older on how to protect themselves from the dangers of financial scamming, all while providing a safe place for them to learn.

## PROJECT MANAGERS

**Elijah Ochoa**

Director of  
Public Relations



**Turner West**

Director of  
Graphic Design



**Mikala Souther**

Director of  
Technical Writing



## TARGET AUDIENCE

Seniors aged 60 and up, a part of the Baby Boomer and Silent Generations

## PROJECT PARTNERSHIP





## PROJECT SCHEDULE

### Milestone 1 GATHERING KNOWLEDGE



### Milestone 2 PLANNING EVENTS



### Milestone 3 EXECUTING CURRICULUM



### Milestone 4 GENERATIONAL AWARENESS



JUN AUG OCT DEC FEB APR

## MANAGEMENT PLAN

### Quality and Risk Measures



WEEKLY SCRUMS



ACCEPTANCE CRITERIA



SPRINT REVIEW

HIGH

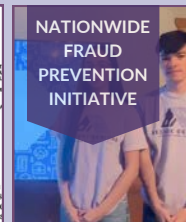
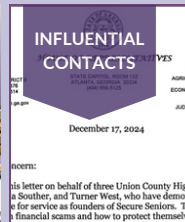
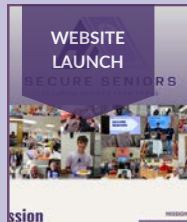
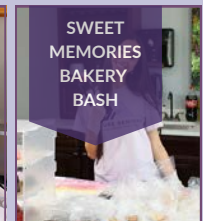
LOW

## KEY METRICS

**7,500+** SENIORS REACHED  
Over 7,500 throughout seven events

**10,000+** IMPRESSIONS  
Gain at least 10,000 using online platforms

**05+** CONVERSATIONS  
Engage in five or more with influential contacts



## INITIATIVES

## EXECUTION

### PHASE 1: Pre-Production

Initially, we conducted secondary research and interviews with a former DECA judge and advisor, Georgia State Representative, and local bank president to learn about the effects of fraud.

### PHASE 2: Planning Period

During this phase, Secure Seniors meticulously planned events and worked with activity directors to ensure our events would educate elders across North Georgia and the nation.

### PHASE 3: Executing Events

Finally, our team hosted events at five elderly establishments, our local United Community Bank, and virtually nationwide, bringing financial literacy to thousands of seniors and their families.

## MONITORING AND CONTROLLING

**Monitoring** - By utilizing a budget, Gantt Chart, Google Sheet, and Jira Board, we visualized deadlines, controlled finances, and maintained project quality.

**Controlling** - We proposed responses to issues such as event attendance, scheduling, and media interaction.

## PROJECT RESULTS

**29,274**  
Seniors Reached

**LIVE IMPACT**  
390.32%

**3**

Conversations Fulfilled

**DIGITAL IMPACT**  
240.40%

**24,050**  
Impressions Made

**CAMPAGNING FOR CHANGE**  
60%

# II. INITIATING



## A. Statement of the Problem

Individuals targeted by elder fraud lost “**over \$3.4 billion in... 2023**” (FBI). On average, 101,068 victims within the United States **lost an estimated \$33,915 each** from various fraud types (FBI). This loss is a staggering amount for a nation whose median income is **\$37,585 yearly** (United States Census Bureau). These alarming numbers grow daily, urging us to take action. The top senior-targeted scams include tech support, personal data breaches, false romantic interests, and fake prizes and investments; however, a majority of these cases go unreported. According to the National Adult Protective Services Association, “**only one in 44 cases of financial abuse [are] ever reported,**” leaving over 2,000 cases of elder abuse unrecognized by our judicial system yearly. In addition, these types of crimes lead elders to lose trust in their banks, families, and everything they hold dear.

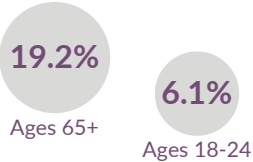
**1 in 10 elderly Americans face financial fraud**



*National Council on Aging*

Furthermore, Georgia has the highest rate of financial scamming in the U.S., with **437 incidents per 100,000 individuals** (Forbes). Georgia residents lost **\$301 million** due to fraud in 2023, with **victims over 60 making up \$90 million of those losses** (FBI). Comparatively, people aged 20-29 lost **\$8,366,971**, which is significantly lower than their senior counterparts (FBI). This immense disparity between the financial losses of seniors and adults aged 20 to 29 highlights an increased susceptibility within the elderly community, thus leading to higher losses and the **purposeful targeting of seniors**.

**Seniors Reported**  
a higher chance of  
being exposed to a  
scammer

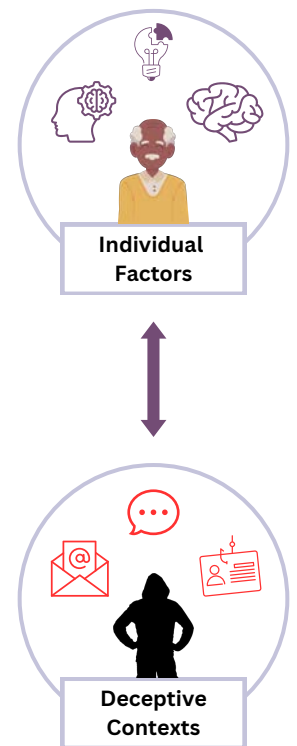


*Federal Bureau of Investigation*

Upon further research, statistics show that seniors are at a substantial disadvantage compared to younger generations due to their **often diminished cognitive abilities and lack of knowledge regarding newer technologies**. The youngest individual within the current elderly population would have been born in 1965, 30 years before the first smartphone was invented. **Fraudsters utilize newer technology that seniors do not understand** comprehensively, leading to increased vulnerability when messaging, phone calls, emails, or the internet are used as contact forms. Moreover, two-thirds of Americans experience some form of cognitive impairment by age 70 and a profound decline in intellectual abilities (NCBI). Elders have difficulty learning to use newer technologies, **making them more susceptible to fraud than ever before**.

“Deception plays a critical role in financial exploitation, and detecting deception is challenging, especially for older adults. Susceptibility to deception in older adults is heightened by age-related changes in cognition.”

*Department of Psychology, University of Florida*



Life-altering scams abuse and take advantage of millions of seniors and their loved ones worldwide. After discovering that these harmful and abusive practices are rampant in our **North Georgia mountain region**, our team was called to action. Local banks and law firms have noticed a rapid increase in financial crimes, from amounts as low as **\$1,000 to \$250,000**. Thus, we created Secure Seniors, an organization that intends to inform citizens 60 and older on how to keep themselves safe from financial fraud.

## B. Project Scope

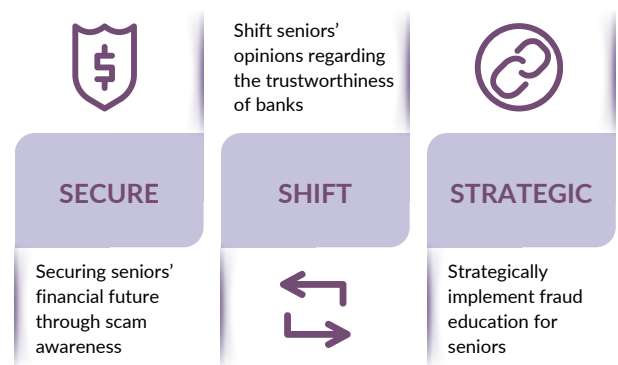
### Purpose of Our Project

Secure Seniors aims to provide elders with **knowledge regarding financial literacy** and the prevalence of scams nationwide. Elders lack a **comprehensive understanding** of newer technology, which fraudsters tend to prey upon. The motive behind our project is to provide seniors with extensive knowledge of the most common modes of scamming and how they **can identify fraud before becoming victims**. By incorporating events that combine financial literacy with exciting activities, our group has created a safe space for seniors to learn about scams and **regain trust in their banks, families, and technology**. Our project's reach spans across the United States, impacting up to 53,000 seniors through social media and in-person outreach.

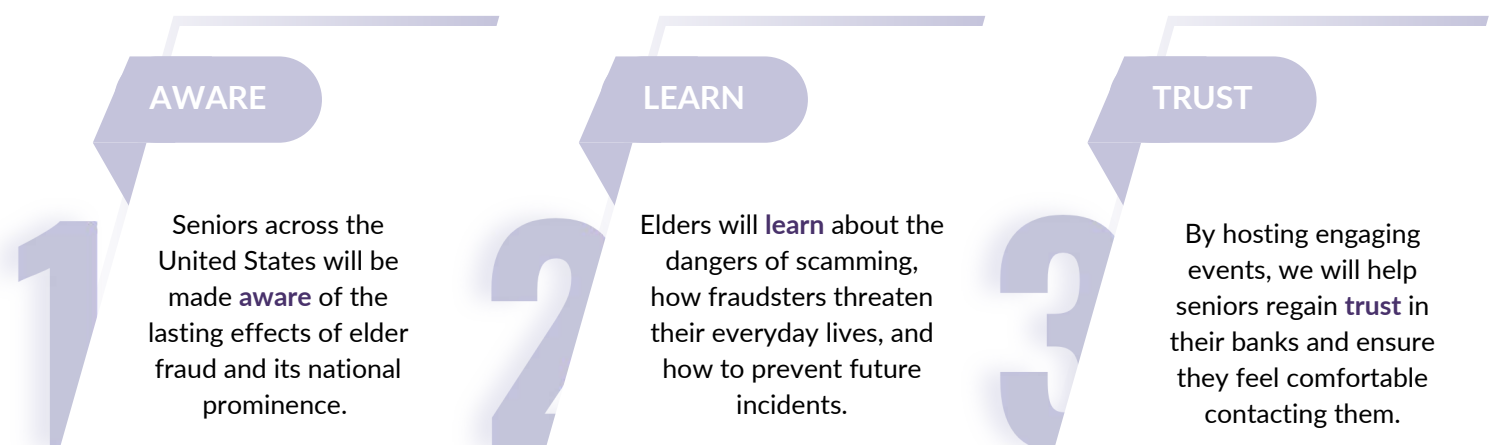
Secure Seniors strives to educate individuals 60 years of age and older on how to protect themselves from the dangers of financial scamming, all while providing a safe place for them to learn.

### Rationale of Our Project

After speaking with our **local United Community Bank President Adam Born**, we discovered how extreme the issue of elder fraud is in the North Georgia region. Although we live in a rural area, he reported that they see at least **nine significant cases** of scamming per month, with elders being the majority of these cases, proving that they are the most susceptible group. Most commonly, targeted seniors will ask their banks to conduct a large wire transfer or take out copious sums of money from their accounts. Customer service representatives and tellers see these as **"red flags."** Employees are taught to question the customers on where and to whom the money is going and why they are asking to conduct an **extreme financial transaction** on short notice. Ultimately, customers often will not answer questions and force employees **to perform their transactions, leading to a significant disconnect between seniors and their bankers**. This alarming trend highlighted the urgent need for better resources and education to protect seniors from financial exploitation. Once we understood the significance of these issues in our region and across the U.S., **Secure Seniors was created**—an organization aimed at lessening the disconnect between seniors and financial literacy.



### Expected Benefits of Our Project



# III. PLANNING AND ORGANIZING



## A. Project Goals

Secure Seniors created the acronym “**SAFE**” to outline our project goals easily and effectively. By highlighting our primary goals—**serve, advocate, focus, and educate** senior citizens and community members—we can expand our outreach and increase our project’s **overall effectiveness**.

### SERVE

the elderly community throughout the United States by providing resources in conjunction with engaging educational events. Thus, our project will help seniors understand the harmful effects of scams and how they can protect themselves against potential fraudsters.

### ADVOCATE

for seniors locally and nationally by facilitating functions at five regional senior facilities and a virtual initiative for nationwide elder establishments. Through these events, we will advocate for elders’ financial safety by providing credible resources and ongoing support to combat scams.

### FOCUS

on reaching over 10,000 impressions on social media platforms (e.g., Facebook, Instagram, and YouTube) by utilizing current marketing trends to promote our initiative and post informative content for followers that can garner the attention of caregivers and family members.

### EDUCATE

over 7,500 seniors using quality financial literacy events on money, scams, and frauds, regardless of location or socioeconomic status, by creating different curriculums based on age and education level to cater to seniors' optimal learning.

## B. Human Resource Management Plan



Our **founders** worked alongside **four project mentors** in various fields to help hone in on our project and mission. Accepting guidance from these mentors helped us develop a well-rounded project. Additionally, our **local United Community Bank** served as a **partnership** to facilitate events and learn about the prevalence of scams. Finally, **five senior living establishments** were crucial in hosting five regional events during our initiative.



## PLANNING AND ORGANIZING

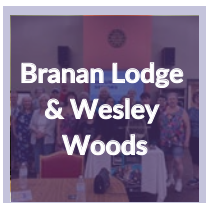
PROJECT ROLE	PERSONNEL	SKILLS & STRENGTHS	RESPONSIBILITIES
FOUNDERS	Director of Public Relations <a href="#">Elijah</a> OCHOA	Her experience as a marketing intern and two-time SCDC DECA Sports and Entertainment Marketing 2nd place finisher has given her the skills to connect with people and communicate effectively.	<ul style="list-style-type: none"> <li>Handle all phone calls and emails prior to executing events</li> <li>Liaise with establishments and partnerships</li> <li>Organize and create local events in coordination with businesses</li> </ul>
	Director of Technical Writing <a href="#">Mikala</a> SOUTHER	Through a long-term legal internship, she has gained a profound understanding of the business terms used in professional settings, therefore, making herself integral to our writing process.	<ul style="list-style-type: none"> <li>Assess accuracy of business and financial terms</li> <li>Ensure writing is formal and grammatically correct</li> <li>Review all emails, social media posts, and letters prior to publishing</li> </ul>
	Director of Graphic Design <a href="#">Turner</a> WEST	Being a national finalist for the 2024 Admiral Nimitz Annual Design Conference, he has a deep passion for design and understands the current marketing standards that will make Secure Seniors stand out.	<ul style="list-style-type: none"> <li>Control our organization's branding and ensure everything is up to marketing standards</li> <li>Create designs for events and social media posts</li> <li>Oversee all social media accounts</li> </ul>
MENTORS	Lead Legal Reference <a href="#">Cary</a> COX	As a presiding magistrate judge and elder law attorney, he has immense knowledge on the subject of scams and fraudsters within our local region.	<ul style="list-style-type: none"> <li>Described how scammers have affected our local region</li> <li>Explained legal ramifications regarding fraud</li> </ul>
	Lead DECA Reference <a href="#">Stan</a> GUNTER	Through serving as a Georgia State Representative, he has firsthand expertise in how our legislature prevents and manages elder fraud.	<ul style="list-style-type: none"> <li>Discussed how the Georgia Congress prosecutes fraudsters</li> <li>Informed us on current laws that prevent scammers</li> </ul>
	Lead Government Reference <a href="#">Debra</a> Moore	Her experience as an ICDC judge and former advisor for one of Georgia's leading chapters has taught her what it takes to succeed in DECA and beyond.	<ul style="list-style-type: none"> <li>Advised us on what competitive event to choose</li> <li>Gave valuable advice for competition</li> </ul>
	Lead Comm. Reference <a href="#">Dr. Richard</a> STAFFORD	As a communications professor, entrepreneur, and playwright, he is an expert of public speaking and how to speak effectively.	<ul style="list-style-type: none"> <li>Listened to our project ideas</li> <li>Taught us how to communicate effectively with establishments and partners</li> </ul>

### Partnerships

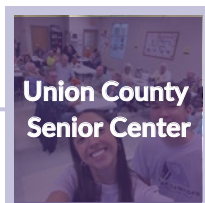


United Community Bank (UCB) **donates over \$580,000** annually to non-profits, schools, and businesses working to support their local communities. Our local UCB supported Secure Seniors through a partnership that began after a meeting with bank president **Adam Born**. He gave us valuable insight into the severity of elder abuse in our area, with **over nine reported scams coming in per month**. Moving forward, UCB advocated for our mission and advised us through our endeavors. Secure Seniors and UCB have **raised awareness of elder fraud** throughout North Georgia using our partnership. Most recently, we hosted a “**SAFER**” Bingo event with the bank to promote Financial Literacy Month and educate the local elderly community.

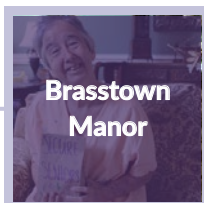
### Establishments



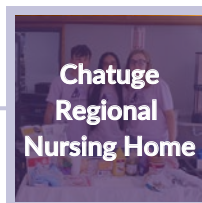
Branan Lodge  
& Wesley  
Woods



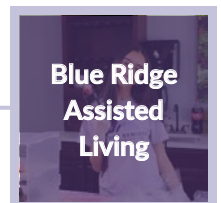
Union County  
Senior Center



Brasstown  
Manor



Chatuge  
Regional  
Nursing Home



Blue Ridge  
Assisted  
Living



## C. Schedule

### I. Milestones

#### ● MILESTONE 1 – GATHERING KNOWLEDGE

**Secure Seniors** will collaborate with former DECA judge and advisor Debra Moore to pinpoint the right event for our initiative. Additionally, we plan to **partner with United Community Bank** while studying **IC3s by the FBI** and studies by the National Census Bureau to understand the effects of scamming. Finally, our team intends to meet with **Georgia House Representative Stan Gunter** to discuss how our government is preventing fraud.

#### ● MILESTONE 2 – PLANNING EVENTS

To organize our events, Secure Seniors plans to **work closely with event coordinators** at each establishment. Initially, we will email the facility director to schedule a meeting about our project and its purpose. After the meeting, we will find the **most optimal space in the facility** and schedule the time and date for our event. By reaching out to these establishments at least three weeks before planning an event, we can **optimize efficiency** and ensure that our event will run in a seamless manner.

#### ● MILESTONE 3 – EXECUTING CURRICULUM

Secure Seniors **aims to educate the elderly community** and their loved ones about financial literacy and how to protect themselves. Our interactive events will allow seniors to **learn the most prominent types of fraud**. With a short presentation followed by engaging events like bingo or a movie, seniors and their families can **learn comprehensively in a fun environment**, allowing them to fully absorb the information.

#### ● MILESTONE 4 – GENERATIONAL AWARENESS

Secure Seniors intends to use our **social media platforms and website** to spread generational awareness. We will launch our website as a **resource that caretakers or families** can use as a reference for our mission. Through social media, we anticipate a **significant shift** in our community's knowledge concerning elder fraud due to our educational posts and informative videos. Additionally, our team anticipates contacting numerous public figures to **garner support and amplify the credibility of our cause**.

### II. Timeline to Reach Each Milestone

MILESTONES	JUN	AUG	OCT	DEC	FEB	APR
Gathering Knowledge	Meeting with Debra Moore Secondary Research	Interview with Sponsor	Interview with GA State Rep.			
Planning Events		Contacting Establishments	Delivering Event Flyers			
Executing Curriculum		"SAFER" Bingo	Movie Mania Bingo Bash	Sweet Memories Bakery Bash Sandwich Social	"SAFER" Bingo in Partnership w/ UCB Nationwide Fraud Prevention Initiative	
Generational Awareness			Influential Contacts Educational Series and Videos	Website Launch	Influential Support	

## D. Quality Management Plan



WEEKLY SCRUMS



ACCEPTANCE CRITERIA



SPRINT REVIEW

Secure Seniors implemented the **Waterfall Project Management Ideology**, a linear, sequential approach to project management. Our project had well-defined objectives before executing our events, which allowed us to adapt to the Waterfall Method. By adopting these ideals, we focused on three management aspects: **hosting weekly scrums**, **implementing acceptable criteria**, and **conducting sprint reviews**.

Our team's **integration of weekly scrums** into our project management plan ensured **consistency and efficiency** throughout all events. We employed the online application **Jira Board** to enhance our scrum's effectiveness and keep the group on task. Furthermore, the creation of acceptance criteria accounted for the **elders' perspective of our presentations** and guaranteed that we held attendees' attention throughout our presentations. Our sprint reviews allowed Secure Seniors to **review accomplished milestones** and hear feedback from each founder to **inspect the progress made**.

Secure Seniors employed three key metrics to ensure our project's quality and **measure our mission's success** when executing the project: **Live Impact**, **Digital Impact**, and **Campaigning for Change**.

### LIVE IMPACT

**7,500+ Seniors Reached**

The number of seniors reached through our project is a **precise, quantitative measure** of its success. Our team tracks seniors' attendance during regional events and the number of nationwide residents who view our informational video to determine the project's effectiveness and how **seniors reciprocate information on scams**. These numbers give us valuable insight into how our project impacts our demographic.

### DIGITAL IMPACT

**10,000+ Impressions**

Secure Seniors utilizes **three social media platforms** to reach our secondary target market: seniors' families and their caretakers. These platforms are **Facebook, YouTube, and Instagram**, where we post event recaps and fraud infographics. Additionally, our team will launch a **website** to showcase our project's mission and provide a contact point for establishments.

### CAMPAIGNING FOR CHANGE

**05+ Conversations**

By actively engaging with government officials, we aim to drive **institutional change** throughout the United States by advocating for **new policies and initiatives** that restrict elder fraud and prioritize seniors' financial security. Using emails and in-person meetings, our team can encourage government officials to use their **power for positive change** and better protect seniors from fraudsters.

## E. Risk Management Plan

Through the use of a **Six Sigma risk management plan**, our team can eliminate risk before it is encountered. Six Sigma is an analysis method employed by our campaign to identify future risks and how to mitigate them.

RISK	THREAT LEVEL	MITIGATION STRATEGY
MARKET RISK	<div> <div> HIGH </div> <div> ↓ </div> <div> LOW </div> </div>	<ul style="list-style-type: none"> <li>Ensure that our presentations are highly engaging for seniors and easy to understand</li> </ul>
STRATEGIC RISK		<ul style="list-style-type: none"> <li>Utilize Jira Board for project founders to easily schedule meetings and events</li> </ul>
OPERATIONAL RISK		<ul style="list-style-type: none"> <li>Establish strong connections via email and in-person meetings with establishments</li> </ul>
SOCIAL RISK		<ul style="list-style-type: none"> <li>Market campaign through Facebook, Instagram, our website, and YouTube</li> </ul>
PERFORMANCE RISK		<ul style="list-style-type: none"> <li>Finish planning and presentations for events at least one week before the scheduled time</li> </ul>
SCHEDULE RISK		<ul style="list-style-type: none"> <li>Plan dates for each meeting and event around the project founders' schedules</li> </ul>

## F. Proposed Project Budget

	Budget
<b>1 "SAFER" Bingo</b>	
Printing	\$ 30.00
Prizes	40.00
Transportation	30.00
	<u>\$ 100.00</u>
<b>2 Bingo Bash</b>	
Prizes	\$ 70.00
Transportation	30.00
	<u>\$ 100.00</u>
<b>3 Movie Mania</b>	
Snack Packs	\$ 100.00
Transportation	30.00
	<u>\$ 130.00</u>
<b>4 Sandwich Social</b>	
Sandwich Supplies	\$ 400.00
Transportation	30.00
	<u>\$ 430.00</u>
<b>5 Sweet Memories Bakery Bash</b>	
Baking Ingredients	\$ 110.00
Transportation	30.00
	<u>\$ 140.00</u>
<b>6 "SAFER" Bingo with UCB</b>	
Printing	\$ 80.00
Lunch/Prizes	120.00
Transportation	30.00
	<u>\$ 230.00</u>
<b>Total</b>	<u>\$ 1130.00</u>

Our projected budget is broken down into six events. The estimated cost for Secure Seniors totaled **\$1130.00**. Contributions from our community donors supported Secure Seniors' mission. **Ingles (Blairsville, GA)** donated **\$400.00** worth of food for our Sandwich Social, while **United Community Bank (Blairsville, GA)** sponsored the remaining costs associated with executing our events. Our last event was included in our pre-planning budget. However, thanks to our partnership with United Community Bank, they fully funded it—separate from their **initial \$500 donation**.





# IV. EXECUTION



## A. Phase 1: Pre-Production



Google Meet



Secondary and Primary Research



June '24 - December '24

In the first stages of Secure Seniors, our team was curious about which category our project would have the most impact. To address this question, we began by hosting a Google Meet with **former DECA judge and esteemed advisor Debra Moore** (Fig. 1). She expertly advised us on the importance of choosing a category in which our project could leave a **lasting influence** on the exploitation of seniors and DECA. Mrs. Moore's guidance was essential in the beginning stages of our project.

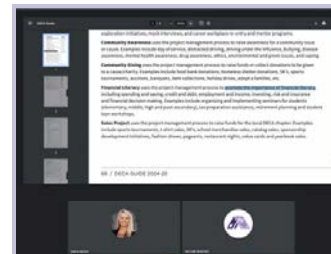


Fig. 1 - Google Meet With Debra Moore



Fig. 2 - Secondary Research



Fig. 3 - Interview With Adam Born



Fig. 4 - Interview With Stan Gunter

Concluding that the **Financial Literacy Project** would best fit Secure Seniors, our group progressed to evaluating **secondary research** about the effects of elder fraud (Fig. 2). We analyzed sources published by the Federal Bureau of Investigation, National Census Bureau Reports, National Institute of Justice, and National Adult Protective Services Association to determine how **widespread elder fraud** is throughout the United States. These studies allowed us to assess fraud's true effect on seniors and their families by pinpointing the number of fraudulent crimes that victimize elders and the **amounts lost due to these crimes**.

Once we felt well-informed about elder fraud, we conducted **primary research**. This phase of gathering knowledge included two meetings that were vital for our success: an interview with **Adam Born** (Fig. 3) and **Georgia State Representative Stan Gunter** (Fig. 4). United Community Bank President Adam Born provided insightful knowledge regarding the current status of elder fraud within our North Georgia region. Additionally, Mr. Born enlightened us on how much the average scam victims lose in Union County, often upwards of **\$15,000**. Following our meeting with Mr. Born, we reached out to Mr. Gunter to understand Georgia laws being put in place to protect our elders. As the **Georgia House's Judiciary Committee Chair and former District Attorney** for the Enotah Judicial Circuit, Mr. Gunter is experienced with Georgia laws and statutes that protect elders and prevent exploitation. The knowledge that we attained from Mr. Gunter's interview was **invaluable** and helped us navigate our project's next steps.



## B. Phase 2: Planning Period



During the second stage of Secure Seniors, our team **focused on pre-planning** to ensure our events were well-**organized and impactful for the senior community**. Through close collaboration with facility directors at in-person establishments and nationwide senior facilities, we guaranteed that every detail was addressed ahead of time. Our team hosted meetings before events and ultimately **facilitated seven successful outreach initiatives**.

Our in-person planning began with outreach to the directors of local senior living establishments. This phase began with introducing our project to the facilities' directors through an **email and phone call**, explaining how our events can benefit their residents' financial safety. Following our initial outreach, we scheduled in-person meetings with the facilities' coordinators. At these meetings, our team worked closely with staff to choose the **most suitable time, date, and location** for seniors to engage in our demonstration. Additionally, we discussed how employees could help aid our efforts in promoting the event internally through **flyers** (Figs. 5-10) and **conversations** with residents. We maintained consistent communication with the facility directors in the weeks leading up to our event, including sending reminders and addressing any last-minute concerns from either party. Ultimately, we prioritized trust and guaranteed a successful event through **constant contact flow**.

### PLANNING PROCESS

- 1 Draft Email & Call Establishments
- 2 In-Person Meeting & Schedule Event
- 3 Promote Event & Address Concerns

To **broaden our outreach and expand our influence nationwide**, Secure Seniors embarked on a virtual mission to educate elders and their families across the United States. Initially, we collected information regarding the largest senior living facilities in our nation. In particular, we focused on the three most popular establishments in each state; then, we began the process of contacting their administrators. By gathering each administrator's email, we were able to send our educational video to senior living facilities across the country, ensuring that thousands of elders had **access to valuable information on fraud prevention**. Through the use of a Google Spreadsheet, we could easily track every senior facility we intended on reaching out to, their email address, and what stage of contact we were in. Along with our video, we included a statement of who we are and our mission as a whole, as well as our intention behind the video to ensure **optimal communication** and understanding regardless of distance.

See Below:

The promotional flyers used by event coordinators to advertise each event are organized chronologically from left to right, ending with our most recent event.



Fig. 5 - Flyer for Branan Lodge & Wesley Woods



Fig. 6 - Flyer for the Union County Senior Center



Fig. 7 - Flyer for Brasstown Manor



Fig. 8 - Flyer for Chatuge Regional Nursing Home

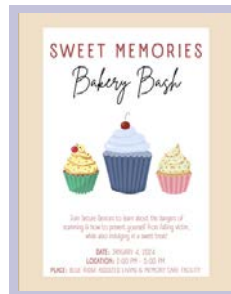


Fig. 9 - Flyer for Blue Ridge Assisted Living



Fig. 10 - Flyer for United Community Bank

## C. Phase 3: Executing Events



Facilitate Events



Grow Outreach Through Social Media &amp; Influential Contacts



September '24 - April '25

### LIVE IMPACT: Key Metric #1

September 21, 2024

#### “SAFER” Bingo

As one of the most extensive assisted living facilities in North Georgia, **Wesley Woods & Branan Lodge** (Fig. 11) serves over **300 seniors**, empowering us to broaden our outreach within the local area. This event, graciously hosted by their assisted living section, allowed us to reach out to residents in an engaging and fun way. To teach these seniors about elder fraud, we incorporated **bingo games** within our presentation about the five most prominent types of scams. Our lecture included the **grandparent, lottery, imposter, robocalls and phishing messages, and romance scams**. Ultimately, our group highlighted the signs and protective measures that seniors can take to safeguard themselves.



Fig. 11 - Group Photo With Attendees



Fig. 12 - “SAFER” Bingo Card

Between each presented scam, attendees played a round of **“SAFER” Bingo**, which required seniors to yell out the word “SAFER” instead of the typical “BINGO.” Overall, seniors played eight rounds of bingo on our personalized Secure Seniors’ bingo cards (Fig. 12). The winners of these games received various candies as prizes. Following “SAFER” Bingo, Branan Lodge & Wesley Wood’s activity director notified us that our event resulted in **glimmering reviews and safer residents**.

“We loved Secure Seniors’ “SAFER” Bingo event! Their initiative is unlike anything I’ve ever seen, and we hope they come back soon.”

-Tina Parks, Activity Director

November 1, 2024

#### Bingo Bash

Our **Bingo Bash** event was hosted at the **Union County Senior Center**, which invited elders from surrounding counties to join and delight in our event (Fig. 13). Senior Center Director **Lee Davis was an integral part** of our Bingo Bash and aided us throughout our planning and executing phases. During our event at the Senior Center, over **110 guests** participated in **ten interactive rounds of bingo** while engaging in an open conversation about the most notable scams, how to identify fraud, and, most importantly, how to protect themselves from possible crimes. The seniors were **highly responsive** to our demonstration and inquired with multiple questions about fraud and previous encounters associated with fraudsters. Following the event, Ms. Davis requested that we come back again due to the event’s popularity and the curiosity of seniors. Additionally, she informed us of the **seniors’ higher confidence rate when faced with scams**.



Fig. 13 - Group Photo With Attendees



November 13, 2024

## Movie Mania

**Brasstown Manor** was the perfect setting to enjoy an entertaining movie and snack pack made by Secure Seniors. Our team gave **57 viewers** a speech on the **top five scams that victimize elders** as they indulged in a Secure Seniors' snack pack, which included **popcorn, a drink, and a decorated bag** (Fig. 15). Ultimately, we chose to highlight common tactics that scammers use and how to **stay vigilant when faced with fraud**. Both seniors and family members listened to our presentation, prompting us to feel confident about their increased knowledge of scamming and how they **would approach risks in the future**.



Fig. 14 - Viewers During Movie



Fig. 15 - Resident Displaying Snack Pack

After an **open conversation** on how seniors could **better protect themselves and stay aware during future scamming encounters**, residents were given a list of equally fun and educational movies. From this selection, they picked ***The Hustle***, which follows two scammers that use standard tactics to target naive individuals. Throughout the film, we paused it periodically to ensure that the seniors **properly recognized scamming methods** (Fig. 14). Overall, attendees of our **Movie Mania** event told us they had a fantastic time and would love for us to return to educate more residents about the prevalence of scamming.

November 15, 2024

## Sandwich Social

Secure Seniors facilitated a successful **Sandwich Social at Chatuge Regional Nursing Home**, bringing together residents for an afternoon of education and homemade sandwiches. This event provided **practical financial literacy advice** and allowed participants to indulge in a convenient bedside lunch. During our event, residents could choose between ham, turkey, peanut butter and jelly, or pimento cheese sandwiches with chips as their side and a variety of sodas to choose from. Each member of Secure Seniors was assigned a designated role to **streamline the lunch-making process** (Fig. 16). Mikala made ready-to-order sandwiches for each resident, Eliyah prepared various drinks, and Turner finished the plates with a side of chips. Every plate was **entirely customizable** for the seniors' wants and dietary needs.



Fig. 16 - Founders With Sandwich Cart

By going room-to-room, we had the opportunity to converse with over **190 residents** on the effects of fraud and how to protect yourself from possible **spam calls, texts, or emails**. Many individuals spoke of the dangers of elder fraud and how they had been victims of it, resulting in us **gaining insight into how seniors are scammed**. Ultimately, the success of our **Sandwich Social** would have been unachievable without the help of our local **Ingles**, who graciously donated our culinary supplies and ingredients. As well as our **DECA chapter**, which permitted us to use their school store cart for easy access to ingredients and utensils. Chatuge Regional's **Sandwich Social** was a special event that empowered seniors and our group alike to promote change. In the end, guests expressed their **admiration for our group and support for our ongoing mission**.



OUR LARGEST EVENT TO DATE

January 4, 2025

## Sweet Memories Bakery Bash

At Secure Seniors' *Sweet Memories Bakery Bash*, we transported **Blue Ridge Assisted Living** residents back in time with delicious vintage-inspired baked goods (Fig. 17). From chocolate-covered strawberries to tea cakes, every attendee could indulge in a sweet treat of their choosing, all while learning the **risks involved with elder fraud**. Our Bakery Bash gathered over **150 residents** in their bistro to discuss the importance of financial literacy at an older age, explicitly highlighting the immense financial literacy gap between seniors and young adults and how elders can **bridge that learning deficit**.



Fig. 17 - Founders Ready to Serve Residents



Fig. 18 - Menu

The goal of our event was to allow seniors to **relive their past memories while securing their financial future**. Residents enjoyed homemade baked goods from our Secure Seniors' menu throughout our presentation (Fig. 18). We took inspiration from vintage baked goods of the **1960s, 1970s, and 1980s**, such as tea cakes, peanut butter buckeyes, snip doodles coffee cake, gooey butter cake, chocolate-covered strawberries, and the classic chocolate chip cookie for seniors to reminisce on memories. Our event received rave reviews on our **baking skills, financial knowledge, and effective communication ability**. The combination of delicious baked goods and practical financial insights left a **lasting impression**, with several participants expressing their gratitude towards our group for educating them.

March 22 - 31, 2025

## Nationwide Fraud Prevention Initiative

We recognized that elder fraud is not only a prevalent issue in Georgia but also **across our county**; therefore, in the final stages of Secure Seniors, our team strived to create an initiative that protected elders across the United States. To combat this issue, our group contacted **150 establishments nationwide, with three facilities per state**. After reaching out to these establishments, we set a point of contact with one of their administrators and sent an educational video (Fig. 19) to each facility via email. This video, created by our team, highlighted the **top five most prominent scams and how seniors can protect themselves from becoming victims** in the future. By sending this video to facilities nationwide, we virtually gave over **28,500 seniors** in the United States peace of mind about their finances and helped directors perceive the frequency of scamming among people over sixty.



Fig. 19 - Extracted Photo From Our Video

April 1, 2025

## "SAFER" Bingo in Partnership with United Community Bank



Fig. 20 - Newspaper Adv.

To strengthen our community ties and outreach, we facilitated a second **"SAFER" Bingo** event with our partner, **United Community Bank**. This event focused on educating our entire community about how to protect yourself from the most prominent scams through the fun of bingo. To kick off **Financial Literacy Month** with an exciting start, we ran newspaper advertisements (Fig. 20) for weeks in advance and posted social media announcements to ensure that all residents were informed about the upcoming event in our area.



Fig. 21 - Founders with UCB Management

During the event, over **130 guests** enjoyed a catered lunch, a presentation on fraud by our local bank directors and Secure Seniors' founders (Fig. 21), and five rounds of **"SAFER" Bingo**. Game winners took home grand prizes; however, all attendees left with a more **profound understanding of scams and how to protect themselves**.

## Social Media Campaign

Throughout our initiative, we **integrated social media platforms** to promote events and inform the general public about our project. Secure Seniors utilized Instagram (Fig. 23), Facebook, and YouTube (Fig. 22) to **connect with our target market and secondary audience conveniently**. Our primary platforms to promote events and advise seniors included Instagram and Facebook. Additionally, we created informational YouTube videos about scams and how our project impacts seniors. Ultimately, our main social media platforms have garnered us over **24,050 impressions and interactions**.



## Website Launch

The launch of Secure Seniors' website (Fig. 24) signified one of the **most crucial events of our digital campaign**. By ensuring that we are **publicized on every digital platform**, from social media to online servers, our mission can reach elders, families, and caretakers alike. To produce our website, Turner concentrated on fabricating graphics, Mikala refined our verbiage, and Elijah worked to publish and promote our final design. Altogether, we worked to **guarantee a successful launch** that would impact and influence all communities. Our website proved to be a valuable asset in **expanding our outreach throughout the nation**.



Fig. 24 - [secureseniors.my.canva.site](https://www.secureseniors.my.canva.site)



### CAMPAIGNING FOR CHANGE: Key Metric #3

## Influential Contacts

To maximize our outreach, we recognized that **endorsements from credible public figures would be necessary**. To address this, we attempted to contact numerous celebrities, corporations, and government officials, all of whom have supported the elderly community throughout their careers. Through this initiative, Secure Seniors was able to partake in an **in-person meeting with Georgia State Representative Stan Gunter** (Fig. 25 in Appendix) on how the Georgia General Assembly is working to protect elders being victimized by fraud. Furthermore, our team **received letters of support from Georgia State Senators Jon Ossoff and Raphael Warnock** to recognize our hard work and impact across Georgia and the United States (Fig. 26 and Fig. 27 in Appendix).



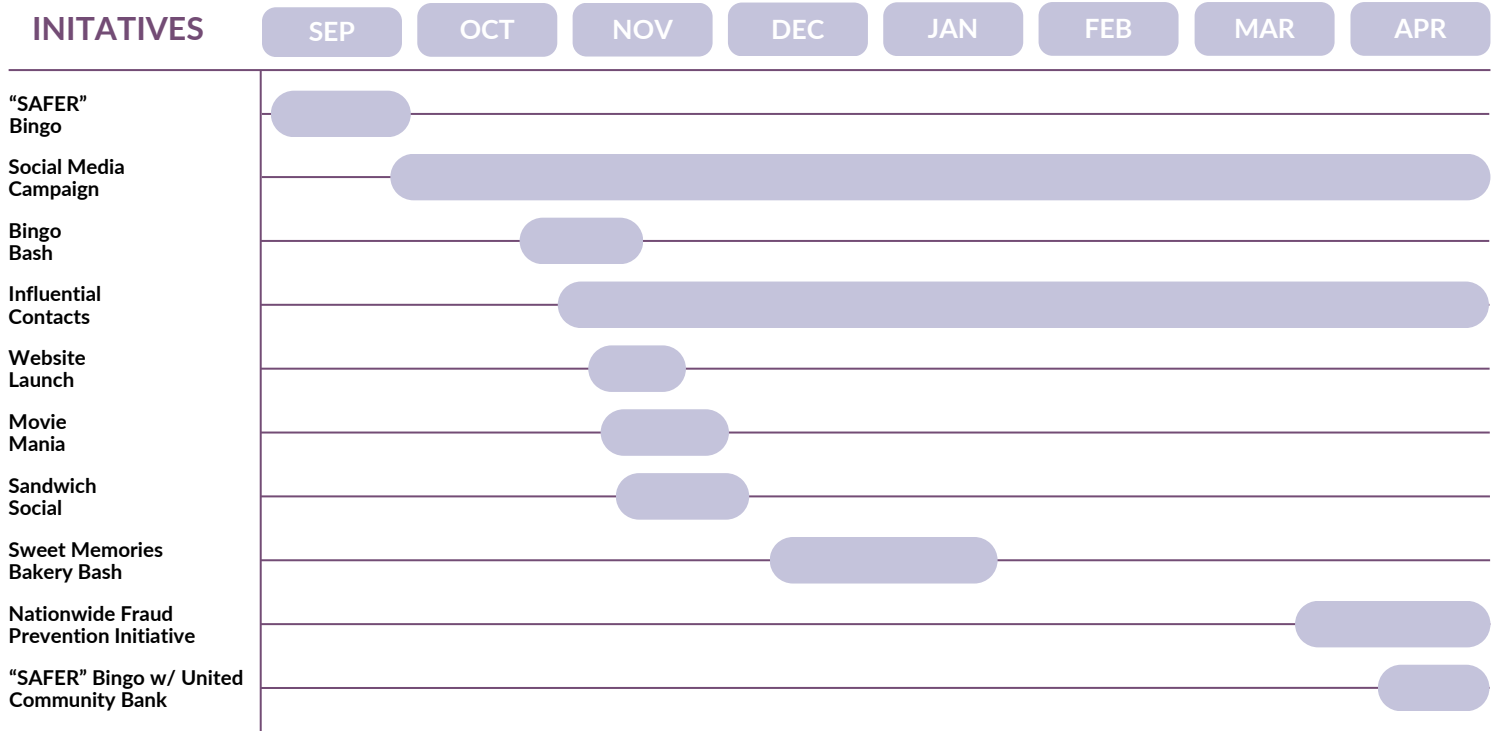
# V. MONITORING AND CONTROLLING



## A. Monitoring

### I. Schedule

Gantt Chart



We utilized a Gantt chart to **visualize deadlines and timeframes**, ensuring **accuracy** through progress meetings. This tool proved essential to our project management, facilitating effective monitoring and **adherence to schedule**.

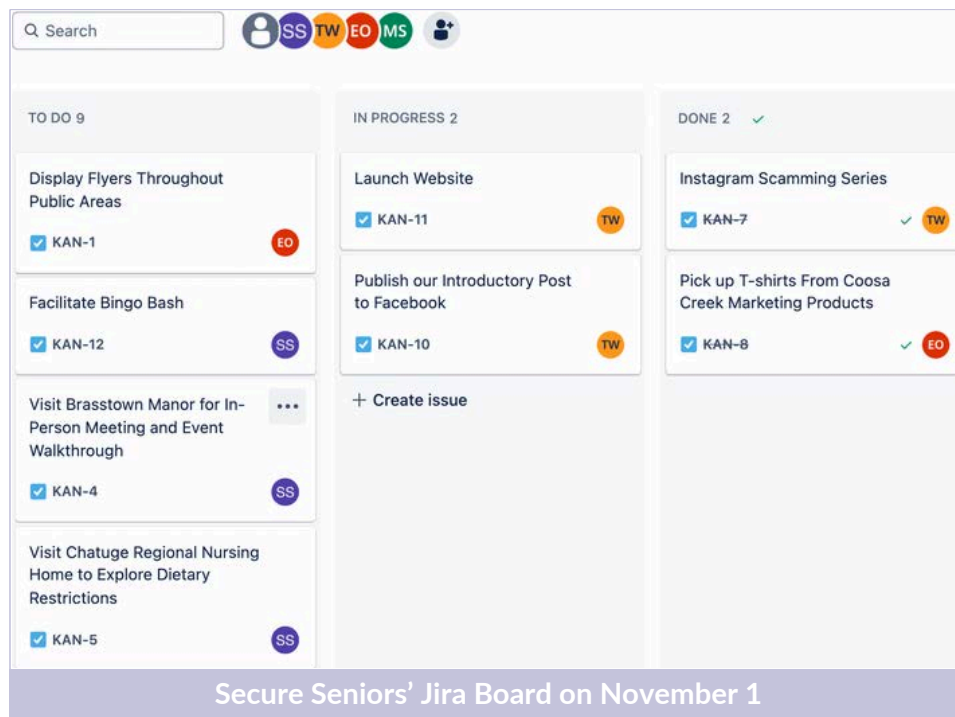
### II. Budget

	Actual Value (as of 4/1/25)	Projected Value	Var. \$	Var. %
<b>1 "SAFER" Bingo</b>				
Printing	\$ 20.00	\$ 30.00	+\$ 10.00	+33.33%
Prizes	34.52	40.00	05.48	+13.70%
Transportation	30.00	30.00	00.00	0%
	<u>\$ 84.52</u>	<u>\$ 100.00</u>	<u>+\$ 15.48</u>	<u>+15.48%</u>
<b>2 Bingo Bash</b>				
Prizes	\$ 52.27	\$ 70.00	+\$ 17.73	+25.33%
Transportation	30.00	30.00	00.00	0%
	<u>\$ 82.27</u>	<u>\$ 100.00</u>	<u>+\$ 17.73</u>	<u>+17.73%</u>
<b>3 Movie Mania</b>				
Snack Packs	\$ 58.92	\$ 100.00	+\$ 41.08	+41.08%
Transportation	30.00	30.00	00.00	0%
	<u>\$ 88.92</u>	<u>\$ 130.00</u>	<u>+\$ 41.08</u>	<u>+31.6%</u>
<b>4 Sandwich Social</b>				
Sandwich Supplies	\$ 400.00	\$ 400.00	+\$ 00.00	0%
Transportation	30.00	30.00	00.00	0%
	<u>\$ 430.00</u>	<u>\$ 430.00</u>	<u>+\$ 00.00</u>	<u>0%</u>
<b>5 Sweet Memories Bakery Bash</b>				
Baking Ingredients	\$ 114.71	\$ 110.00	-\$ 04.71	-4.28%
Transportation	30.00	30.00	00.00	0%
	<u>\$ 144.71</u>	<u>\$ 140.00</u>	<u>-\$ 04.71</u>	<u>-3.36%</u>
<b>6 "SAFER" Bingo with UCB</b>				
Printing	\$ 30.00	\$ 80.00	+\$ 50.00	+62.50%
Lunch/Prizes	150.00	120.00	30.00	-25.00%
Transportation	30.00	30.00	00.00	0%
	<u>\$ 210.00</u>	<u>\$ 230.00</u>	<u>+\$ 20.00</u>	<u>+8.70%</u>
<b>Total</b>	<u>\$ 1040.42</u>	<u>\$ 1130.00</u>	<u>+\$ 89.58</u>	<u>+7.93%</u>

After completing all of Secure Seniors' events, our team calculated the actual value of the expenses incurred. This **comparative analysis** allowed us to calculate the variance between our **estimated and final costs**. After finding the difference between overheads, we donated the remaining money to the **Agewell Foundation USA**, a non-profit that continually fights for over **25,000 elders daily**.

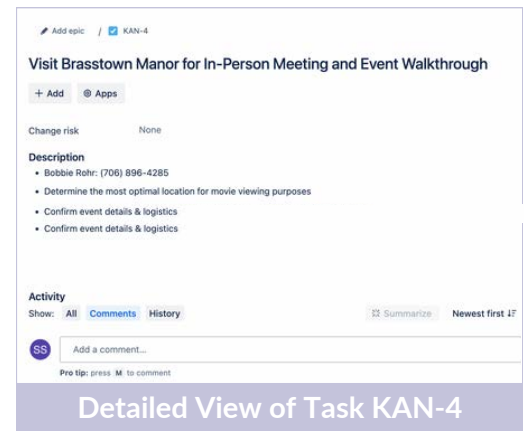
## III. Project Quality

Throughout our project, **quality and integrity** were our top priorities. To ensure this, we used **Jira Board**, which helped our team plan visualize, and manage our work. On Jira Board, each member was assigned designated tasks



Secure Seniors' Jira Board on November 1

and due dates, with the platform allowing us to easily see what projects were "to do," "in progress," and "done." This tool gave us easy access to past timelines and events while preparing us for **crucial upcoming milestones** within our project.



Detailed View of Task KAN-4

As we prepared to make Secure Seniors a nationwide initiative, we used **Google Sheets** to make organizing easy while working with **150 domestic establishments**. To check our progress on the "**Fraud Prevention Tracker**," we labeled each establishment, listed alongside their state, contact information, and number of residents, as "not available," "in progress," or "completed." Ultimately, this application was integral to keeping our information in order and appropriately arranged. For access to our "Fraud Prevention Tracker," [CLICK HERE](#).

## B. Controlling

Despite careful planning, we encountered a few issues throughout our events. While these complications initially presented a risk, we were able to address them effectively through our **risk management plan**. Ultimately, these issues did not significantly impact Secure Seniors, and we were able to **execute the project successfully**.

### ISSUES ENCOUNTERED

Event Attendance	Scheduling	Media Interaction
<p><u>Description:</u></p> <p>The attendance for our first event did not have the expected turnout we anticipated due to a lack of publicity.</p>	<p><u>Description:</u></p> <p>Scheduling conflicts arose within some events due to the busy schedules of establishments and project managers.</p>	<p><u>Description:</u></p> <p>At the initiation of our social media accounts, their interactions were lacking on Facebook and Instagram.</p>

## ACTIONS TAKEN

Event Attendance	Scheduling	Media Interaction
<p><u>Response:</u> To counteract this, we promoted our events throughout establishments using flyers and word-of-mouth.</p>	<p><u>Response:</u> We responded by utilizing Google Sheets and Jira Board to manage our time and workload effectively.</p>	<p><u>Response:</u> As a response, we established a posting schedule and uploaded content during designated times to optimize our reach.</p>

## VI. CLOSING THE PROJECT



### A. Evaluation of Key Metrics

#### PROJECT RESULTS

We are proud to report the following statistics after successful project completion.

KEY METRICS

7,500+

SENIORS REACHED

10,000+

IMPRESSIONS

05+

CONVERSATIONS

29,274

Seniors Reached

LIVE IMPACT

390.32%

3

Conversations  
Fulfilled

DIGITAL IMPACT

240.40%

24,050

Impressions Made

CAMPAIGNING  
FOR CHANGE

60%

For access to calculations of our key metrics, [CLICK HERE](#).

### DISCUSSION

Secure Seniors sought to impact three areas: **live, digital, and influential**. Through our initiative, we were able to satisfy our key metric of reaching 7,500 seniors by over **390.32%** while surpassing our goal of making 10,000 digital impressions by **240.40%**. Although we met our two goals of reaching **over 7,500 seniors** and making **10,000 digital impressions**, we fell short of (1) **fulfilling 5 or more conversations with government officials**.

(1) Unfortunately, **due to a lack of responses**, our team could not execute five successful conversations with government officials. During our *Executing Events* phase, we contacted numerous individuals but only heard back from three of them: Jon Ossoff, Raphael Warnock, and Stan Gunter. We received **letters of support from Senators Ossoff and Warnock** recognizing our actions and commending our work. Furthermore, **Representative Gunter met with us** about how the Georgia General Assembly prevents elder fraud and sent an additional letter to aid our initiative. In the future, we plan to **establish connections with at least two more government officials** to further increase our impact.

#### FUTURE CONTACTS



GA Governor:  
Brian Kemp



U.S. President:  
Donald Trump



## B. Lessons Learned

### Initiating

**Strengths:** Began to understand the widespread effects of elder fraud through primary and secondary research and used that knowledge to shape the foundation of our project.

**Weaknesses:** Struggled to define our project's specific goals and target market until further research was found on nationwide elder fraud statistics and the main age groups victimized by its crimes.

### Planning

**Strengths:** Prepared for six in-person events by collaborating with numerous mentors and created approaches for possible issues that we might encounter throughout our project.

**Weaknesses:** Faced challenges promoting events and gaining traction initially on our informational posts across Facebook, Instagram, and YouTube.

### Execution

**Strengths:** Creating fun and engaging activities increased participation and comprehension, helping us to foster a more interactive and enjoyable learning environment.

**Weaknesses:** Scheduling events that work with all three founders' schedules and establishments' activities proved difficult, and methods need to be improved in the future.

### Monitoring

**Strengths:** Consistently using project management tools to organize our work.

**Weaknesses:** Learning how to properly operate each individual system at first.

### Controlling

**Strengths:** Addressing our issues by creating solutions before they happen.

**Weaknesses:** Failing to recognize all possible issues that might occur during our project.

## C. Recommendations for Future Projects

In the future, we hope to expand Secure Seniors' outreach to an online, interactive learning platform where seniors and their families **play fun games and take quizzes on their knowledge of scams**. By making this platform similar to previously established digital learning programs, we can **ensure users are protected** from all types of scams and that we complete our mission across the United States.

Lifeline Literacy will serve as an extension of Secure Seniors, focusing on **virtual learning for seniors around the globe**. Through further research on elder fraud statistics, our group discovered that seniors in countries like Mexico, Nigeria, and the United Kingdom are exploited at an exponential rate, with an insignificant amount of resources being used to help them. We believe that by **creating short and educational thirty-minute videos** in their countries' native language, we can expand our outreach to seniors and their families everywhere. Ultimately, these videos will be sent to establishments worldwide, hoping to eventually have **up to 50 different language translations** for non-English speakers. To accomplish this feat, Lifeline Literacy will partner with U.S. embassies across the globe, where there are bilingual workers who can help us make informational videos in the designated country's language.



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# VIII. APPENDIX

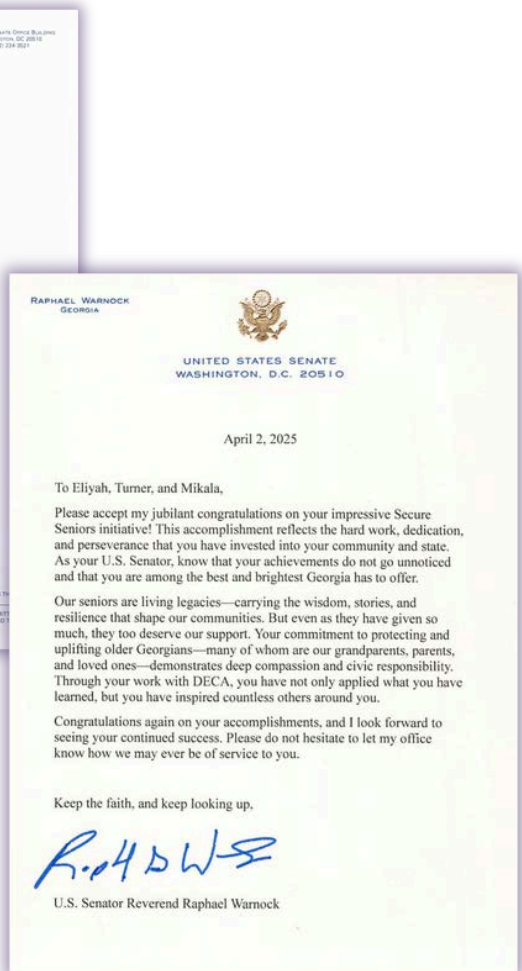
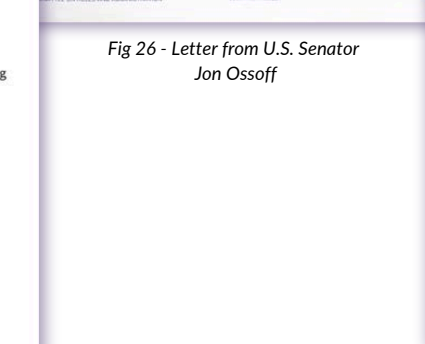
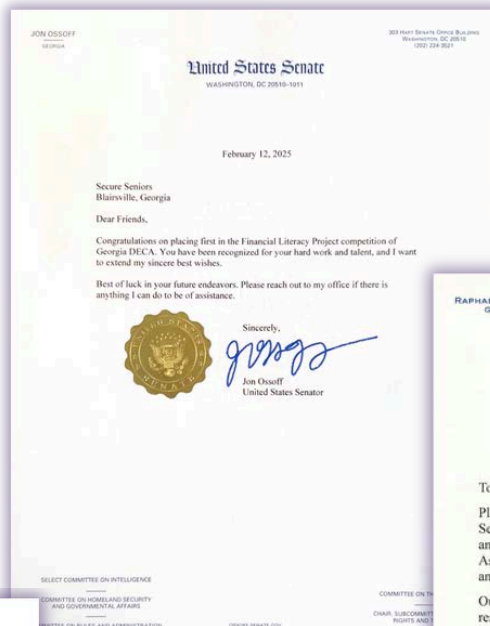
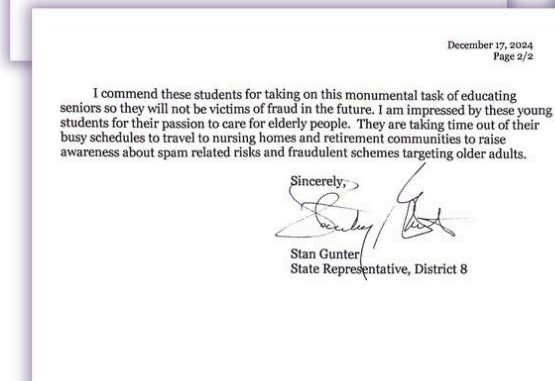
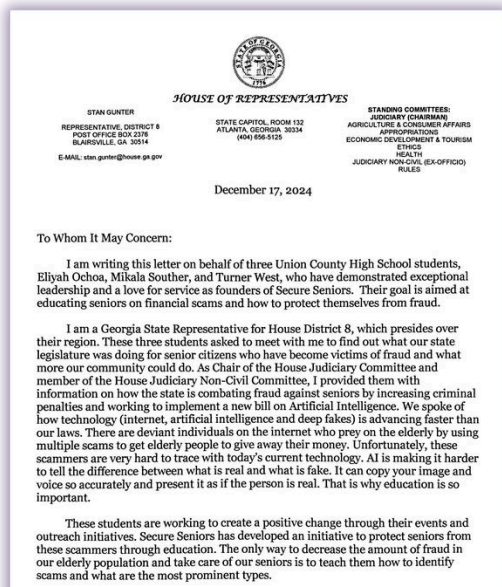


Fig. 25 - Letter from GA Representative Stan Gunter

Fig. 27 - Letter from U.S. Senator Raphael Warnock